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FRANCE'S
LIVESTOCK
AND
MEAT
INDUSTRY //

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FRANCE'S LIVESTOCK AND MEAT INDUSTRY X

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Summary

The Economic and Social Development Plan for France from 1961 through 1965 contains definite goals for the French livestock and meat industry, including a 25-percent expansion in meat production. The primary objective is to produce enough meat to supply import requirements of Common Market countries by the end of 1965.

Most of the French beef industry is a byproduct of dairy farming, although beef is one of the main products of the French farmer. Beef cattle are grazed during the warm months with some winter feeding in all areas during the winter season.

In 1961 cattle numbers were estimated at 19.4 million head, about 18 percent above the 1951-55 average of 16.5 million. Beef and veal production reached a record 3.3 billion pounds, compared to an average of 2.6 billion during 1951-55.

Tallow production also increased to 254 million pounds in 1961, or 10 percent above the 232 million produced in 1960 and 54 percent above the 1951-55 average of 165 million.

Hog numbers in 1961 were estimated at 9.0 million head, 17 percent above the 7.7 million average for 1951-55. The Large White hog is the most popular breed in France. Pork production totaled 2.3 billion pounds in 1961, against a 1951-55 average of 1.8 billion.

French domestic lard production has changed very little in the last 3 years. In 1960 and 1961, production was estimated at 168 million pounds, compared with 175 million in 1959.

In 1961, sheep numbers were estimated at 8.5 million head, 18 percent above the 7.2 million average for 1951-55. Sheep are produced in most of the areas of France, with the heaviest production in the area adjacent to the Charollaise and Limousine cattle-producing areas. Output of mutton and lamb was 287 million pounds in 1961, compared with a 1951-55 average of 239 million.

French production of hides and skins in 1961 showed gains for all types compared with the 1951-55 averages. Cattle hides, estimated at 3.4 million pieces, were 42 percent higher; calf skins, estimated at 4.6 million pieces, 9 percent higher; sheep skins, at 6.1 million pieces, 30 percent higher.

France is a net exporter of live animals and animal products. During 1961 France exported a total of 255 million pounds of meat, and has set a goal of 600 million to 800 million to be reached by the end of 1965.

As a Member of the Common Market, France is gradually lowering its tariff rates for Member Countries and increasing external tariffs for third countries. By 1970, tariffs for the Member Countries are supposed to drop to zero, while external tariffs will have increased to the point where it will become difficult, pricewise, for third countries to compete in the market with Common Market Members. The proposed Common External Tariffs will be 22 percent on fatback and 20 percent on lard, variety meats, and most other edible meats. Tallow and greases will have

a 2 to 4 percent external tariff, while hides and skins are not expected to have any external tariff under the present plan.

In addition to the external tariffs on various livestock and meat items, France, along with other Common Market Members, will have variable import levies, import certificates, and a support price system which will result in additional trade problems for nonmember countries.

Importance of Livestock Industry

Agricultural production is important in the French economy, employing about 25 percent of the active population and contributing a substantial portion of the national income and exports. Livestock is the most important type of farming in France. During 1961 approximately 30 percent of the national farm income came from the marketing of cattle, hogs, sheep, and horses.

The significance of the French agricultural output may be judged by the fact that it represents about one-fourth of all agricultural production in Western Europe; of the total land area of more than 136 million acres, approximately 41 percent is used for agricultural production, while the rest consists of permanent grasslands, forests, and wasteland. The small family-operated farm predominates, but in recent years there has been a gradual trend toward larger farms and a concentration of individual farm areas in one location.

An estimated 30 percent of French agricultural land still consists of fragmented holdings composed of scattered or irregular strips which cannot be cultivated efficiently. The government bears most of the expense to farmers who consolidate their land. To date, more than 6 million acres have been reallocated to form more compact and easier cultivated units.

Livestock is produced in all of the 10 distinct natural regions of France, but heavy production is limited to a few of the more productive grazing areas. The 16 Departments of central and northern France produce about 45 percent of the country's

Table 1.--LIVESTOCK: French livestock numbers on farms,
average 1951-55, annual 1957-61

Year ^{1/}	Cattle	Hogs	Sheep	Horses	Mules
	<i>1,000 head</i>	<i>1,000 head</i>	<i>1,000 head</i>	<i>1,000 head</i>	<i>1,000 head</i>
Average:					
1951-55	16,506	7,725	7,225	2,322	189
Annual:					
1957	17,924	8,130	8,572	1,982	160
1958	17,925	8,572	8,063	1,904	155
1959	18,408	8,744	8,433	1,825	153
1960	18,735	8,941	8,357	1,742	141
1961	19,435	9,043	8,526	1,664	132

^{1/} Month of estimate, October.

Table 2.--MEAT: French production by type,^{1/}
average 1951-55, annual 1957-61

Year	Beef	Veal	Mutton and lamb	Pork	Horse meat	Total
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Average: 1951-55	1,918	697	239	1,771	185	4,810
Annual:						
1957	2,116	765	260	2,221	187	5,549
1958	2,061	728	243	2,221	209	5,462
1959	2,006	750	254	2,251	212	5,473
1960	2,191	802	276	2,049	229	5,547
1961	2,480	837	287	2,267	229	6,100

^{1/} Carcass weight basis. Excludes variety meats.

Table 3.--LIVESTOCK PRODUCTS: French production by type,
average 1951-55, annual 1957-61

Year	Lard ^{1/}	Tallow	Variety meats	Cattle hides	Calf skins	Sheep skins
	<i>Mil. lb.</i>	<i>Mil. lb.</i>	<i>Mil. lb.</i>	<i>1,000 pieces</i>	<i>1,000 pieces</i>	<i>1,000 pieces</i>
Average: 1951-55	137	190	165	2,419	4,192	4,713
Annual:						
1957	159	165	188	2,654	4,187	5,375
1958	164	200	185	2,556	3,993	5,024
1959	175	225	186	2,749	4,207	5,426
1960	^{2/} 168	232	^{2/} 185	3,041	4,497	6,079
1961	^{2/} 168	254	^{2/} 185	3,405	4,647	6,080

^{1/} Rendered and unrendered (unrendered is about 3 percent of total).

^{2/} Estimated.

A favorite beef breed in France is the Charolaise. Top, the pure-bred bull Kepi, now in service at the artificial insemination center of the department of Ain. Below, some of Kepi's daughters.



pasture and most of the beef and milk animals. Hogs are produced in all sections of France, but commercial hog production is concentrated near the feed-producing regions.



Cattle

During 1961, cattle numbers in France reached a record 19.4 million head, 4 percent above the 1960 estimate of 18.7 million and 18 percent above the 1951-55 average of 16.5 million head.

Most of the cattle used for slaughter are raised on the dairy farms. About 50 percent of the cattle are dairy breeds, 13 percent dual purpose, 12 percent beef breeds, and 25 percent local native breeds, sometimes called "triple purpose"--work, milk, and meat animals.

The Charolaise is the most popular beef breed with the Limousine running a close second. Most of these two breeds are produced in the regions south of Paris, distinctive of the name of the breed--Charolees and Limoges. These two breeds are also crossed with cows of the Normandy (classified as a dairy breed by the French) and Holstein breeds to produce beef animals. At present the Normandy is the most important dairy breed but the number of Holsteins is increasing rapidly.

France, like several countries, is trying to produce leaner beef, especially beef with less superficial fat covering and slightly more marbling of fat within the lean. At present, much emphasis is being directed toward baby beef production, mostly young bulls. These uncastrated yearlings are usually marketed when they are between 12 and 14 months old. This meat has no superficial fat and is tender--the type of meat the French consumer is currently demanding.



Also popular for beef is the sturdy Limousine breed. Top, a herd sire with cows at pasture; below, the bull at home in the farmyard, with some younger examples of the Limousine breed.



Veal is a popular meat in France. A large percentage of the veal animals are fed on reconstituted milk until they are between 3 and 3-1/2 months old, at which time they are slaughtered. These are called "white calves," in reference to the meat color.

Beef producers must produce either abundant pasture or inexpensive winter fodder. Many farms can do both. Some hay and fodder feeding is necessary for 4 to 5 months a year except in the Normandy coastal region, where usually 2 months of extra feeding is adequate.

Hogs

In 1961, hog numbers were estimated at 9.0 million head, 1 percent above the 8.9 million in 1960 and

17 percent above the 7.7 million average during 1951-55.

Hogs are produced throughout France, but hog production is heaviest in certain regions, mostly in the heavy milk-producing areas west of Paris. The Large White, Pietrain (a Belgium breed), and Landrace are the most popular breeds, with the Large White by far the most important. As elsewhere in Europe, there is a trend toward breeding for the longer and leaner bacon-type hog.

Because of this trend, France is not a heavy lard producer. In 1961, production of rendered lard equivalent was estimated at 168 million pounds, about the same as 1960 but 4 percent below the 175 million produced in 1959. A large percentage of

Favored in France for dairy purposes are the Normandy and Holstein breeds, though in other countries the former is often considered dual-purpose, useful for both meat and milk. Top, a Normandy bull; below, a cow, also of the Normandy breed.



the rendered lard is being exported, in increasing quantities, in some instances in competition with U.S. lard.

Sheep

Sheep numbers in 1961 were estimated at 8.5 million head, 1 percent above the 8.4 million head in 1960 and 18 percent above the 7.2 million average for 1951-55. Mutton and lamb production is low compared with beef and pork because France produces mostly wool breeds of sheep, principally the Merino, Île de France, and Berrichon du Cher breeds. The Texel (a Netherlands breed) is produced mainly for meat. The lamb crop from these types is usually a cross with the Southdown ram. Sheep are also produced for milk in the mountainous regions, the breeds used for this purpose being the LaCaune and Alps.



Slaughter

Cattle and calf slaughter reached a postwar high in 1961 of 9.8 million head, 5 percent above 1960 and 48 percent above the average for 1951-55. About 5.0 million of the 9.8 million head slaughtered in 1961 were calves; calf slaughter accounts for about 60 percent of the total bovine animals slaughtered annually. Hog slaughter in 1961 is estimated at 13.2 million head, about the same as 1960 or more

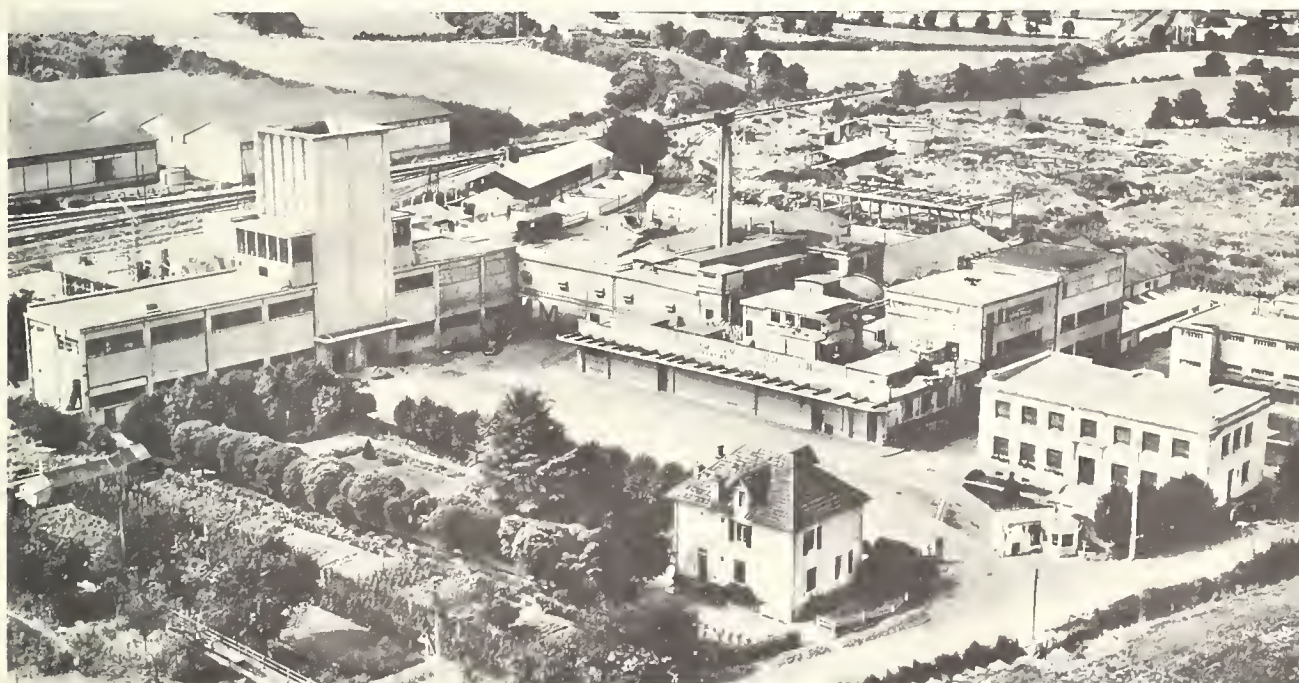
Table 4.--LIVESTOCK: French slaughter by type,
average 1951-55, annual 1957-61

Year	Cattle and calves	Sheep and lambs	Hogs	Horses
	<i>1,000 head</i>	<i>1,000 head</i>	<i>1,000 head</i>	<i>1,000 head</i>
Average: 1951-55.	6,609	4,713	6,161	276
Annual:				
1957	9,001	7,353	14,004	284
1958	8,467	7,128	14,050	321
1959	8,684	7,079	14,324	324
1960	9,345	8,001	13,187	326
1961	9,821	8,046	13,170	361

than twice as high as the average for 1951-55. Sheep slaughter was 8.0 million head in 1961, the same as in 1960 but 70 percent above the average for 1951-55.

Horse slaughter has gradually increased in recent years, reaching a postwar high of 361,000 head in 1961, 11 percent above the level of 1960 and 31 percent above the 1951-55 average. Fresh horsemeat is used for human consumption in France, as well as in most of the Western European countries.

At present about 65 percent of all French slaughtering is done in municipal slaughterhouses, 23 percent in small privately owned ones, and 12 percent in large private or cooperatively owned ones. In Paris, La Villette, a very obsolete plant, is the main slaughterhouse; 80 percent of the city's livestock slaughtering is done there. This establishment also functions as a livestock and meat market, at which livestock and meat prices are usually set for all of France.



Set in the rolling countryside of south central France is the modern slaughterhouse at Villefranche-d'Allier, which serves the cattlegrowers of all the Bourbonnais district.

Under the country's current economic and social development plan, La Villette's activities will be limited, and eventually it will be replaced by a number of small modern slaughterhouses located in and around the Paris area.

Production Trends

Potential for Increased Production

French livestock production has increased at 1-1/2 to 2 percent a year for the past 10 years. Cattle, hogs, and sheep have increased at about the same rate annually, while horse production has decreased at about 4 percent annually during the same period.

France has an abundance of natural resources such as pastures and feed grains that can be converted into livestock products. The present trend is to increase the production rate for cattle, hogs, and sheep. The country's goal is to supply the entire Common Market with livestock, meat, and meat products by the end of 1965. This is not impossible, but no incentive is offered in the way of price support or subsidy payments to livestock producers. There is a theory that external tariffs will restrict the inward flow of inexpensive foreign meats from other producing areas and build a strong price structure within the Common Market which will convert the energy of pasture and grain into livestock and meats for the Common Market countries.

Marketing Practices

French livestock producers have numerous outlets for their animals -- a situation which ordinarily indicates a very competitive market. In France, however, even though there is more than one channel for moving animals to market, there is still a tendency toward monopoly in cattle dealing.

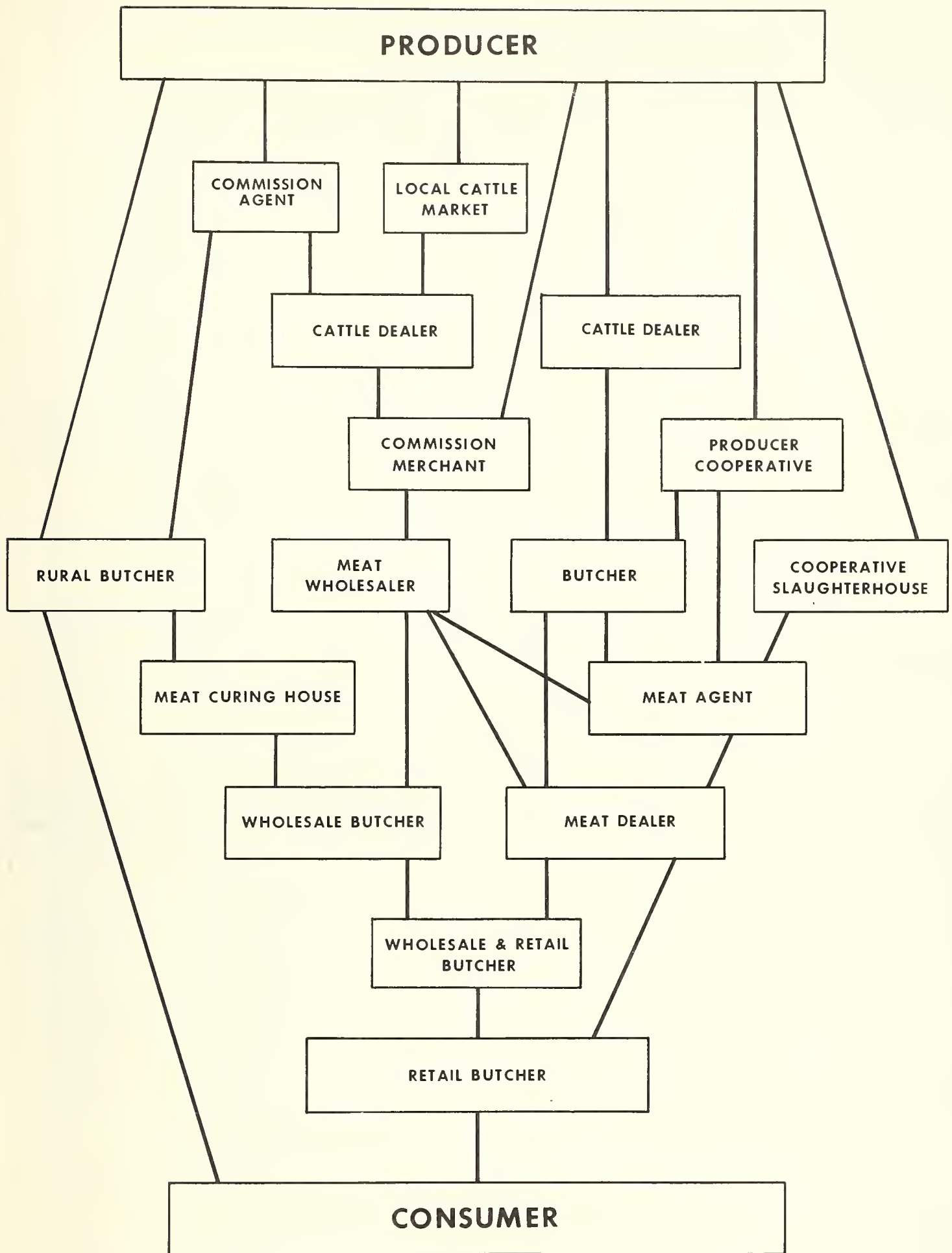
French beef animals are usually kept on the farm until they are slaughtered--for 2-1/2 to 4 years. The producer may market his animals through the local livestock market; through a commission agent (sometimes called a "rabateur"); through cattle dealers; through livestock cooperatives; or directly to a slaughterhouse (see chart showing marketing channels from producer to consumer). There are no livestock auctions in France.

Meat Production Policies

France has no direct price support or subsidy payments for live animals, but it does have a meat price stabilizing agency for beef and pork. This is administered through the Société Interprofessionnelle de Bétail et de Viandes, commonly referred to as SIBEV. This is a quasigovernmental organization formed in 1953 to regulate meat prices.

During October of each year the ceiling price (referred to as "campaign price") and the minimum price ("intervention price") are set for the following year.

When the price on carcass meat falls to within 10 centimes per kilo (about 1 U.S. cent per pound) above the intervention price, SIBEV prepares to buy and the public is notified of its plans. However, actual purchases do not begin until 8 days after the price reaches that level. SIBEV will then continue to buy carcass meat



until the price reaches 15 centimes per kilo (1-1/2 cents per pound) above the intervention price. Beef purchased by SIBEV is frozen and stored for either future domestic sale or export.

France does not permit imports of meat until local prices (usually based on Paris wholesale prices) have reached or slightly surpassed the campaign price. At this time, imports are permitted and SIBEV resells the previously purchased meat on the local markets at the going rate. Meat imports are prohibited when the price falls below the campaign price; however, SIBEV can continue to sell stocks on hand if an outlet for frozen meat is available. There is little demand for frozen meat in France.

In 1961, SIBEV purchased and stored 154 million pounds of meat. This was later sold to the USSR (88 million pounds); Spain, (44 million); and East Germany (22 million). Most of this meat was forequarter beef, which is in small demand in France.

The French Ministry of Agriculture provides artificial insemination service stations for livestock producers for which the producer pays a nominal fee.

France also has a program for the eradication of bovine tuberculosis and foot-and-mouth disease. Diseased animals are slaughtered and the owner is paid 75 percent of the slaughter value.

Table 5.--LIVESTOCK, MEAT, AND MEAT PRODUCTS: French exports by type,^{1/} 1957-61

Commodity	1957	1958	1959	1960	1961
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Beef and veal	23.2	10.0	66.2	137.9	230.7
Pork	2.2	1.8	12.6	27.4	20.1
Mutton and goat.. . . .	.6	.4	1.4	3.1	4.5
Horse meat.	--	--	.1	.1	.2
Total red meat	26.0	12.2	80.3	168.5	255.5
Canned meat	40.5	50.0	42.9	41.8	46.9
Variety meats	.3	.2	1.1	1.0	1.0
Sausage	10.0	11.2	10.9	11.2	11.5
Fatback	16.6	12.9	21.5	24.1	11.2
Lard	14.0	58.0	66.0	78.0	94.0
Tallow	15.6	34.1	22.2	19.7	51.7
Cattle hides.	29.9	28.8	52.0	62.4	81.2
Livestock:	<i>1,000 head</i>	<i>1,000 head</i>	<i>1,000 head</i>	<i>1,000 head</i>	<i>1,000 head</i>
Cattle	17.3	14.8	71.8	133.4	121.5
Sheep	1.4	3.8	45.8	106.8	103.0
Hogs	1.1	2.3	89.5	110.9	45.1
Horses	1.3	8.5	9.5	11.5	7.9
Mules	3.5	2.7	3.1	2.3	1.0

^{1/} Product weight basis.

Foreign Trade

Live Animals

France is a net exporter of live animals and animal products; it is also a substantial annual importer of these commodities. In 1961, cattle and calf exports totaled 121,500 head, compared with 133,500 head in 1960 and 71,800 head in 1959. About 60 percent of the 1961 exports of live bovines consisted of calves. Italy was the most important outlet, taking about 45 percent of the 1961 total. Algeria ranked second with 29 percent, and West Germany third with 19 percent.

Bovine imports were 11,500 head in 1961, nearly all coming from the Netherlands. In 1960, cattle imports were only 3,200 head compared with 5,400 head in 1959. Prior to these years, France was a net importer.

Sheep exports totaled 103,000 head in 1961, compared with 106,800 head in 1960. In 1960 and 1961, France imported only 4,700 head and 13,500 head, respectively. Before this period, France was a net importer of sheep.

France has been a net importer of horses since 1957. Imports in 1961 totaled 113,300 head, compared with 93,900 in 1960 and 82,900 in 1959. Nearly all horse

Table 6.--LIVESTOCK, MEAT, AND MEAT PRODUCTS: French imports by type,^{1/} 1957-61

Commodity	1957	1958	1959	1960	1961
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Beef and veal	71.8	50.9	61.0	59.6	24.0
Pork	21.7	37.1	7.2	41.4	80.7
Mutton and goat	11.2	14.4	10.0	12.3	11.9
Horsemeat	--	--	.1	.6	.3
Total red meat	104.7	102.4	78.3	113.9	116.9
Canned meats	2.7	2.4	2.3	4.7	4.9
Variety meats	29.1	36.7	20.2	32.4	40.7
Sausage	.9	.8	1.3	1.5	1.7
Cattle hides	35.4	31.0	32.5	38.7	37.0
Calf and kip skins	12.6	15.0	10.6	8.1	5.9
Livestock:	<i>1,000 head</i>	<i>1,000 head</i>	<i>1,000 head</i>	<i>1,000 head</i>	<i>1,000 head</i>
Cattle	52.8	24.8	5.4	3.2	11.5
Sheep	94.5	119.7	54.6	4.7	13.5
Hogs	5.7	35.1	3.4	118.4	101.7
Horses	43.6	46.1	82.9	93.9	113.3
Mules	1.2	1.6	2.0	1.1	2.1

^{1/} Product weight basis.

Table 7.--BEEF AND VEAL: French exports by country of destination, 1957-61

Country	1957	1958	1959	1960	1961
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Germany, West	.3	.1	29.5	68.2	111.3
Algeria	9.7	6.9	14.3	24.3	27.0
Netherlands	8.6	1.2	12.4	14.8	23.5
Germany, East	--	--	(1/)	6.0	21.9
Czechoslovakia	--	--	1.1	--	11.0
Italy	2.7	.1	7.1	21.0	10.4
Spain	--	--	(1/)	(1/)	9.0
Hungary	--	--	(1/)	--	5.0
Other countries	2.0	1.7	1.8	3.6	11.6
Total	23.3	10.0	66.2	137.9	230.7

1/ Included in "other countries."

imports were for slaughter. West Germany, Algeria, Denmark, and Yugoslavia were the largest suppliers in 1961. Live horse exports in 1961 were 7,900 head; in 1960, 11,900 head; and in 1959, 9,500 head.

Meat

Beef and Veal.--France has been a net exporter of beef and veal during the last 3 years, and in 1961 it exported a record 231 million pounds. This was 67 percent

Table 8.--BEEF AND VEAL: French imports by country of origin,^{1/} 1957-61

Country	1957	1958	1959	1960	1961
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Netherlands	27.9	10.1	22.6	26.2	12.1
Malagasy, Republic of	--	2.5	4.1	6.9	6.0
Germany, West	6.4	9.6	19.0	23.9	4.6
Argentina	9.8	11.0	2.6	1.4	.6
Denmark	13.5	3.3	6.7	--	--
Belgium-Luxembourg	.1	1.1	.1	.1	--
Other countries	14.1	13.3	5.9	1.1	.7
Total	71.8	50.9	61.0	59.6	24.0

1/ Product weight basis.

above the 138 million pounds exported in 1960 and 950 percent above the 22 million exported in 1959. West Germany was the most important outlet in 1961, taking 111 million pounds; Algeria and East Germany took 27 million each. The French consumer does not particularly like forequarter beef, even though it is usually 50 percent cheaper than hindquarter. Consequently a large percentage of the forequarter is available for export. In recent years, purchasing power has increased, enabling the average French consumer to buy the higher priced hindquarter beef cuts.

France is planning to increase meat exports, with a goal of 800 million pounds annually by the end of 1965, mostly beef and veal.

In 1961 France imported only 24 million pounds of beef and veal, compared with 60 million in 1960, and 61 million in 1959.

Pork.--France has been a net importer of fresh pork every year since 1957 with the exception of 1959. During 1961, pork imports totaled 81 million pounds, 98

Table 9.--PORK, FRESH OR FROZEN: French exports by country of destination, 1957-61

Country	1957	1958	1959	1960	1961
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Germany, West	.3	--	8.6	18.9	17.2
Algeria	.2	.9	.9	1.8	2.5
Italy	.6	.7	2.7	.8	--
Other countries	1.1	.2	.4	5.9	.4
Total	2.2	1.8	12.6	27.4	20.1

Table 10.--PORK: French imports by country of origin, 1957-61

Country	1957	1958	1959	1960	1961
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Denmark	10.9	19.4	1.2	1.5	28.4
Netherlands	3.2	4.2	.1	25.4	22.7
Belgium-Luxembourg	.4	.3	--	5.6	17.6
Hungary	1.8	1.8	2.3	3.6	5.4
Argentina	.3	--	.5	.7	2.4
Germany, West	.2	2.1	.3	.8	1.8
Germany, East	1.6	2.4	.7	1.5	--
Other countries	3.3	6.9	2.1	2.3	2.4
Total	21.7	37.1	7.2	41.4	80.7

percent above the 1960 total of 41 million. Denmark, the Netherlands, and Belgium-Luxembourg were the most important suppliers of pork, supplying 35, 28, and 22 percent, respectively, in 1961.

France also exported small quantities of pork in the same years. In 1961 exports totaled 25 million pounds, compared with 27 million in 1960 and 13 million in 1959. West Germany was the largest outlet, taking about two-thirds of the total annual exports during the past 3 years. Algeria and Italy were also substantial market outlets, but of lesser importance.

Mutton and Goat.--France has a two-way trade in these commodities, but has been a net importer during the past 5 years. In 1961, imports totaled 12 million pounds; in 1960, 12 million; and in 1959, 10 million. From 1957 through 1961, the Netherlands was the most important source.

Exports were small, amounting to 4.5 million pounds in 1961, 3.1 million in 1960, and only 1.4 million in 1959. Algeria was the most important outlet during these years, taking over 95 percent.

Table 11.--MUTTON AND GOAT MEAT: French imports by country of origin, 1957-61

Country	1957	1958	1959	1960	1961
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Netherlands	6.0	4.8	6.7	9.0	8.0
Hungary	--	.3	.3	--	.6
Germany, West	--	.5	--	--	.3
Argentina	--	3.0	--	2.8	--
Other countries	5.2	5.8	3.0	.5	3.0
Total	11.2	14.4	10.0	12.3	11.9

Variety Meats.--France is a substantial net importer of variety meats. In 1961, imports totaled 41 million pounds, compared with 32 million in 1960 and 20 million in 1959. The United States was the largest source during these 3 years, supplying 15.5 million pounds, or 38 percent of the total 1961 imports; 9.2 million pounds, or 28 percent, in 1960; and 5.5 million pounds, or 27 percent, in 1959. Argentina, the Netherlands, Denmark, and Belgium-Luxembourg were other important suppliers in order of importance in 1961.

France exports small quantities of variety meats, mostly to the Common Market countries.

Table 12.--VARIETY MEATS: French exports by country of destination, 1957-61

Country	1957	1958	1959	1960	1961
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Belgium-Luxembourg	.4	--	3.0	3.6	2.7
Algeria	.2	.1	.4	1.2	2.6
Germany, West	--	--	.6	1.5	1.7
Italy	--	--	.3	.5	.3
Martinique	.3	.3	.3	.2	.2
Netherlands	.3	.3	.6	--	--
Other countries	.3	.2	1.1	1.0	1.0
Total	1.5	.9	6.3	8.0	8.5

Table 13.--VARIETY MEATS: French imports by country of origin, 1957-61

Country	1957	1958	1959	1960	1961
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
United States	3.8	4.5	5.5	9.2	15.5
Argentina	13.1	14.7	5.2	5.2	5.5
Netherlands	4.5	2.6	1.5	7.4	5.5
Denmark	2.6	4.3	.7	1.6	2.9
Belgium-Luxembourg	2.3	3.0	1.0	2.0	2.6
Germany, West	.2	1.4	.6	2.1	1.4
Other countries	2.6	6.2	5.7	4.9	7.3
Total	29.1	36.7	20.2	32.4	40.7

Canned Meats.--In addition to fresh meat, France has substantial exports of corned beef, canned beef and veal, canned pork, and tripe. During 1961, canned meat exports totaled 47 million pounds. This figure is 12 percent above the 1960 total of 42 million pounds and 9 percent above the 43 million exported in 1959, but it is 6 percent below the 50.0-million-pound record of 1958.

Algeria was the most important outlet during the last few years, taking about 35 percent annually since 1959. In 1958, West Germany was the most important outlet, taking about 40 percent of total exports.

Table 14.--CANNED MEATS: French exports by country of destination, 1957-61

Country	1957	1958	1959	1960	1961
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Algeria	14.1	15.7	14.1	17.1	23.4
Germany, West	7.6	19.8	13.2	4.2	4.9
Philippines, Republic of.	1.2	.3	--	1.4	2.6
Greece	.7	.8	--	--	1.8
United Kingdom	6.5	4.0	3.0	2.1	1.8
Martinique	.8	.7	.7	.8	1.1
Guadeloupe	.8	.7	.5	.8	.6
United States	.2	.1	--	--	.7
Tunisia	.7	.6	.4	--	.7
Belgium-Luxembourg	.2	.2	.3	.5	1.1
Italy	--	.1	.2	.1	.6
Other countries	7.7	7.0	10.5	14.8	7.6
Total	40.5	50.0	42.9	41.8	46.9

Sausages and fatback.--France exported 12 million pounds of sausages in 1961, compared with 11 million in 1959 and 1960. Algeria has been the most important outlet since 1957, taking two-thirds of the annual sausage exports. Other countries taking French sausages include West Germany, Martinique, and Tunisia.

In 1961, West Germany and Belgium-Luxembourg were the most important outlets for fatback, taking 6.2 and 4.7 million pounds, respectively, or a total of 97 percent of the 11.2 million pounds exported that year. From 1957 through 1960, Italy was an extremely important outlet for French fatback.

Lard

France has been increasing its lard exports. In 1957, they were only 58 million pounds; by 1961 they had risen 69 percent to 98 million pounds. Of the total, 57 million, or 58 percent, went to the United Kingdom. This lard is generally being used in several specialized U.K. baking industries, but some is also being sold at retail in direct competition with U.S. lard. Belgium-Luxembourg and West Germany have also been significant outlets for French lard during recent years.

Exports will very likely continue to increase in future years as domestic production rises. French lard exports are subsidized at 30 old francs per kilo (less than 1 U.S. cent per pound).

Table 15.--SAUSAGES: French exports by country of destination, 1957-61

Country	1957	1958	1959	1960	1961
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Algeria	6.7	7.9	7.3	8.4	7.7
Germany, West	.5	.8	1.2	.5	.5
Martinique	.3	.3	.3	.4	.5
Tunisia	.4	.3	.2	--	.2
Other countries	2.1	1.9	1.9	1.9	2.6
Total	10.0	11.2	10.9	11.2	11.5

Table 16.--FATBACK: French exports by country of destination, 1957-61

Country	1957	1958	1959	1960	1961
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Germany, West	.2	--	3.1	4.6	6.2
Belgium-Luxembourg	3.5	1.7	2.1	7.6	4.7
Italy	9.7	8.9	16.3	7.5	--
Netherlands	3.2	.7	--	.6	--
Other countries	--	1.6	--	3.8	.3
Total	16.6	12.9	21.5	24.1	11.2

Table 17.--LARD: French exports by country of destination, 1957-61

Country	1957	1958	1959	1960	1961
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
United Kingdom	26	37	46	52	57
Belgium-Luxembourg	12	11	15	21	10
Germany, West	7	8	9	9	6
Reunion Islands	6	3	5	5	--
Other countries	7	7	3	7	25
Total	58	66	78	94	98

Tallow

Tallow exports totaled 52 million pounds in 1961, compared with 20 million pounds in 1960. Spain was the most important outlet during 1961, taking 11 million pounds; Belgium-Luxembourg ranked second with 8 million; and Algeria and Morocco third, each taking 5 million. France is not a large tallow producer in relation to the number of cattle, sheep, and horses slaughtered, for the French produce lean animals with little superficial fat for tallow manufacture.

Although a net exporter, France imports some tallow from the United States. For the period 1957-61 these imports averaged 12 million pounds annually.

Table 18.--TALLOW: French exports by country of destination, 1957-61

Country	1957	1958	1959	1960	1961
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Spain	--	12.3	6.4	1.1	10.5
Belgium-Luxembourg	.5	.5	1.8	7.0	7.8
Algeria.	5.4	3.3	2.1	1.7	4.6
Morocco	2.5	2.9	2.1	4.3	4.6
Germany, West	.8	1.4	.9	.1	2.9
Netherlands.	2.5	.5	.6	--	2.1
Other countries	3.9	13.2	8.3	5.5	19.2
Total	15.6	34.1	22.2	19.7	51.7

Hides and Skins

During 1961 France was a net importer of cattle hides; imports totaled 37 million pounds, while exports were only 26 million. During 1959 and 1960, however, France exported substantially more than it imported. In 1959, exports totaled 52 million pounds, compared with imports of 33 million. In 1960, exports were 62 million pounds and imports only 4 million.

West Germany and Italy have historically been the largest outlet for French cattle hides in the past 5 years. The most important suppliers of cattle hides to France in 1961 were the Netherlands, Argentina, and the United States, in order of importance.

France is a large importer of calf and kip skins, taking 6 million pounds in 1961, the smallest amount imported in any one year since 1955. In 1960, imports totaled 8 million pounds, compared with 11 million in 1959 and 15 million in 1958. Algeria, Argentina, Tunisia, and the Netherlands have been the largest suppliers of calf and kip skins.

Table 19.--CATTLE HIDES: French exports by country of destination, 1957-61

Country	1957	1958	1959	1960	1961
	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>
Germany, West	8,347	8,047	17,671	12,132	5,683
United Kingdom	999	690	930	1,117	3,106
Greece	2,171	2,668	1,484	3,317	394
Italy	8,641	8,326	11,649	20,679	3,500
Netherlands	2,084	3,636	8,477	6,956	1,339
Portugal	2,565	2,692	1,511	3,522	1,395
Sweden	---	---	1,530	---	84
Belgium-Luxembourg	1,220	542	1,917	1,658	1,603
Japan	---	---	275	525	---
Iran	---	179	---	267	---
Egypt	---	---	---	466	---
Other countries	3,887	2,100	6,535	11,761	8,526
Total	29,914	28,880	51,979	62,400	25,630

Table 20.--CATTLE HIDES: French imports by country of origin, 1957-61

Country	1957	1958	1959	1960	1961
	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>
Netherlands	8,470	7,589	5,176	5,194	9,880
Argentina	8,577	6,743	7,147	4,878	4,902
United States	1,621	1,767	471	3,340	4,806
Madagascar	4,688	4,945	5,820	4,497	3,512
French Africa	2,254	1,783	1,262	---	2,252
Germany, West	1,181	1,590	2,374	1,899	2,082
Ethiopia	418	683	1,187	614	1,027
Algeria	1,276	912	73	---	718
British Africa	---	313	647	---	540
Cameroons	---	425	---	540	520
Belgium-Luxembourg	1,450	704	589	453	509
Nigeria	427	333	298	628	492
New Zealand	734	---	---	---	75
Australia	1,111	596	647	501	---
Indonesia	47	30	298	---	---
Other countries	3,154	2,627	6,494	6,191	5,722
Total	35,408	31,040	32,483	38,735	37,037

Table 21.--CALF AND KIP SKINS: French imports, 1957-61

Country	1957	1958	1959	1960	1961
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Tunisia	1.9	1.4	1.1	---	.9
Algeria	3.4	3.3	3.7	2.3	.6
Germany, West	---	1.0	.8	.4	.5
Argentina	2.2	2.2	1.5	.3	.3
United States	.2	1.0	.2	.2	.3
Australia	.3	1.6	---	.2	.1
Netherlands	1.2	1.8	.9	.4	.1
New Zealand	.7	.5	.2	.3	.1
Kenya, Uganda, Tanganyika	.5	.8	.2	---	---
Canada	---	.5	---	.2	---
Other countries	2.2	.9	2.0	3.8	3.0
Total	12.6	15.0	10.6	8.1	5.9

Consumption

During 1961, per capita consumption of red meats in France averaged 129 pounds, compared with an average of 116 during 1951-55. Beef and veal supplied 67 pounds, pork 46 pounds, mutton and lamb 6 pounds, horsemeat 5 pounds, and

Table 22.--MEAT: Total French consumption by type,^{1/}
average 1951-55, annual 1957-61

Year	Beef and veal	Pork ^{2/}	Mutton and lamb ^{3/}	Horse meat	Variety ^{4/} meats	Total red meat
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Average: 1951-55	2,577	1,788	251	186	165	4,967
Annual:						
1957	2,910	2,182	271	189	215	5,767
1958	2,802	2,195	257	209	185	5,648
1959	2,726	2,186	262	218	186	5,577
1960	2,913	2,025	295	231	185	5,649
1961	3,082	2,100	294	231	220	5,927

^{1/} Carcass weight basis.

^{2/} Excludes lard.

^{3/} Includes goatmeat.

^{4/} Estimated.

Table 23.--MEAT: Per capita French consumption by type,
average 1951-55, annual 1957-61

Year	Beef and veal	Pork ^{1/}	Lamb and mutton ^{2/}	Horse meat	Variety ^{3/} meats	Total per capita
Average:	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>	<i>Pounds</i>
1951-55	60.4	41.9	5.8	4.4	3.9	116.4
Annual:						
1957	65.9	49.5	6.1	4.3	4.9	130.7
1958	62.8	49.2	5.8	4.7	4.1	126.6
1959	60.5	48.5	5.8	4.8	4.1	123.7
1960	63.9	44.5	6.4	5.1	4.1	124.0
1961	67.0	45.6	6.4	5.0	4.8	128.8

^{1/} Excludes lard. ^{2/} Includes goat meat. ^{3/} Estimated.

variety meats 5. Meat consumption rose to nearly 130 pounds per capita in 1957, but dropped below 124 pounds in 1959. In the past 2 years, however, it has been steadily increasing.

France's 1961 per capita beef consumption, though the largest in Western Europe, was considerably smaller than the consumption in Uruguay (161 pounds); Australia (87 pounds); the United States (94 pounds); and Argentina (168 pounds).

The French consumer demands tender lean beef with no superficial fat. Currently, the trend is for young animals with tender lean meat, even though this type of meat is lacking in flavor. Beef cuts from hindquarters are preferred, despite the fact that they are double the price of forequarter cuts. There is little demand for the beef forequarter for fresh consumption.

Veal consumption is high, and the housewife will pay a premium for milk-fed veal.

Competitive Aspects of the Common Market

France is a net exporter of livestock and meat products, but it imports substantial quantities of specific animal products, including some from the United States.

In 1961, U.S. exports of meat and meat products to France amounted to \$4.4 million. This included \$2.8 million of variety meats, \$0.7 million in hides and skins, \$0.6 million in inedible tallow and greases, and smaller amounts of mohair, casings, and other meat products. France, however, along with the other Common Market countries, is increasing external tariffs while lowering the rates between the Member Countries. Tariff adjustments toward the duty-free movement of goods between EEC countries and the Common External Tariffs (CXTs) for Third Countries are scheduled to take place in definite stages, with final adjustments to be completed by 1970.

Table 24.--LIVESTOCK AND MEAT PRODUCTS: U.S. exports to France, by quantity and value, 1957-61

Commodity	1957	1958	1959	1960	1961
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Quantity:					
Variety meats	3.4	4.8	4.6	8.0	13.2
Tallow and greases	10.1	.1	14.7	28.5	8.2
	<i>1,000 pieces</i>	<i>1,000 pieces</i>	<i>1,000 pieces</i>	<i>1,000 pieces</i>	<i>1,000 pieces</i>
Cattle hides	28	15	4	46	63
Calf and kip skins	36	144	24	13	26
	<i>Million dollars</i>	<i>Million dollars</i>	<i>Million dollars</i>	<i>Million dollars</i>	<i>Million dollars</i>
Value:					
Variety meats	--	1.1	.9	1.5	2.8
Tallow and greases	.9	--	1.0	1.8	.6
Cattle hides	.2	.1	.1	.5	.6
Calf and kip skins	.1	.6	.1	.1	.1
Total	1.2	1.8	2.1	3.9	4.1

The new French tariffs on livestock and meat products became effective January 1, 1962, as integration of the Common Market progressed. Tariffs on inedible tallow from third countries were decreased from 15.5 percent to 11.1 percent ad valorem. Tariffs within the EEC countries decreased from 12 percent to 10.5 percent. The contemplated CXT for industrial tallow and greases is 2 percent, to be reached about 1970. By that year, there supposedly will be no internal duties for tallow and most other livestock products within the 6 present Member countries.

France's current general duty, effective January 1, 1962, on frozen hog and beef variety meats is 6 percent ad valorem. The rate is 3.6 percent on variety meats of all other animals except equines. There is no tariff on any of the variety meats imported from Common Market countries. The eventual CXT on frozen beef and pork variety meats will be 20 percent, and that on frozen lamb variety meats, 12 percent. This will tend to price U.S. products out of the French market.

Hides and skins, unprocessed mohair, and animal casings will continue to enter France duty free.

The provisions of the Common Agricultural Policy on beef and veal will be more important than the tariff changes in regulating trade within EEC and trade with third countries. The European Common Market Executive Commission on May 9, 1962, announced its proposed common agricultural policy for cattle and beef. This provides for a system of support prices, variable import levies, import certificates, common external tariffs, and the removal of internal duties. These proposals have been sent to the Council of Ministers for approval.

Table 25.--FRANCE: Changes in import duties, January 1, 1962,
and Common External Tariffs

Tariff number	Description	Common External Tariff	General tariff		EEC countries	
			Old	New	Old	New
02.01	Meat and edible offals fresh or frozen	<i>Percent ad valorem</i>	<i>Percent ad valorem</i>	<i>Percent ad valorem</i>	<i>Percent ad valorem</i>	<i>Percent ad valorem</i>
	Meat:					
	Beef and veal	20.0	<u>2</u> /31.5	20.0	---	---
	Pork	20.0	<u>3</u> /31.5	6.0	---	---
	Lamb and mutton	20.0	<u>4</u> /31.5	23.5	20.0	17.5
	Edible offals of bovines and swine:					
	Livers	20.0	<u>3</u> /20.0	6.0	---	---
	Other	20.0	<u>3</u> /15.0	6.0	---	---
	Edible offals of other species except equines:					
	Livers	12.0	<u>3</u> /20.0	3.6	---	---
	Other	12.0	<u>3</u> /13.5	3.6	---	---
02.06	Salted, dried or smoked pork (except a few types of European hams): ..	25.0	36.0	35.0	32	28
05.04	Casings (edible)	---	<u>3</u> /13.5	---	---	---
15.01	Lard and rendered pork fat:					
	For industrial purposes	4.0	32.0	23.6	25.6	22.4
	Other	20.0	32.0	28.4	25.6	22.4
15.02	Tallow and greases (rendered):					
	For industrial purposes	2.0	15.0	11.1	12.0	10.5
	Other	10.0	15.0	13.5	12.0	10.5
41.01	Raw hides and skins		---	---	---	---
41.02	Bovine and equine leather:					
	Not further prepared than tanned..	9.0	9.0	9.0	6.5	6.5
	Other:					
	Of large bovines	10.0	10.0	10.0	7.8	7.8
	Calfskins	10.0	10.0	10.0	6.5	6.5
	Equine leather (except Hungarian dressed)	10.0	10.0	10.0	6.5	6.5

1/ To be applicable about 1970. 2/ Duty temporarily reduced to 3 percent but
subject to an import quota. 3/ Duty temporarily suspended. 4/ Duty temporarily
reduced to 25 percent.



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